Adjutant Software Customer Support
Tech Notes

Document Title: Creating an Export File
Document Number: 035
Applies to: Campaign ToolBox

SUMMARY

This Tech Note describes how to use the Export feature to create a file that can be opened in Excel or Access or other Spreadsheet or Database program. The Export feature is very flexible, but it will export exactly what you tell it to - not necessarily what you want it to. This document will go through one example of how to create an export file.

For this example, we will end up with a Tab-delimited file containing all contributors who have given more than $100 and live in a zip code that begins with "32". The list will be sorted by last name, then first name.

PROCEDURE

1. From the blank screen, click on the menu item *File*, then select *Export data*.

2. Select the *Type of Export File* and *Type of Records to Export* for the file. The *Type of Records* selection determines what appears in the *Available Fields* box.

3. To set the format of the exported data, click on the *Exported data format* menu item. For most uses, this doesn't matter since it can be changed in the program you will be using the data in.
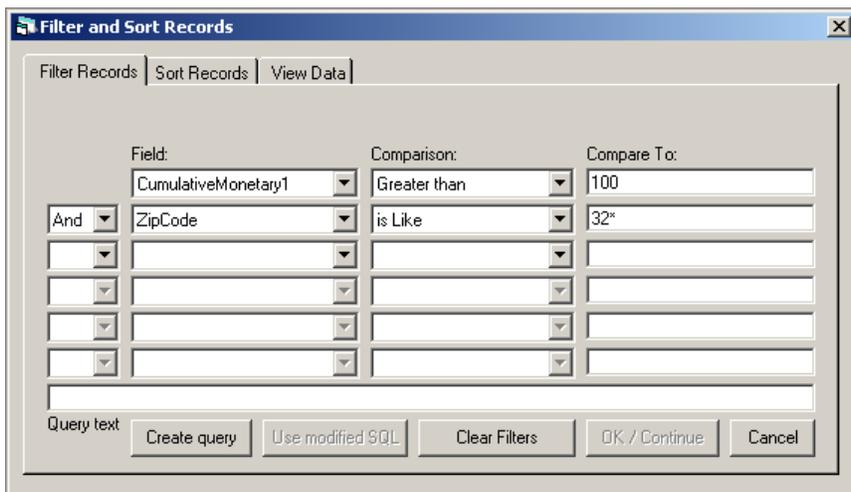
4. Double click on the fields shown in the *Available Fields* box to move them to the *Selected Fields* box. The *Selected Fields* are what will appear in your export file. In this example, we will be creating a tab-delimited file of Demographic records. The file will contain the first and last names along with the cumulative total that each person has given. Depending on your state, you may need to select a different field than what we use in this example.
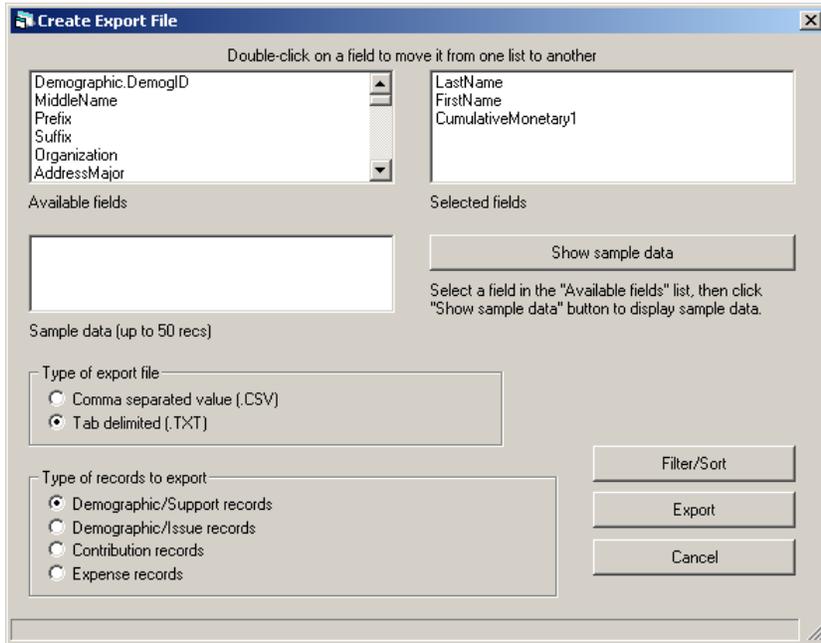
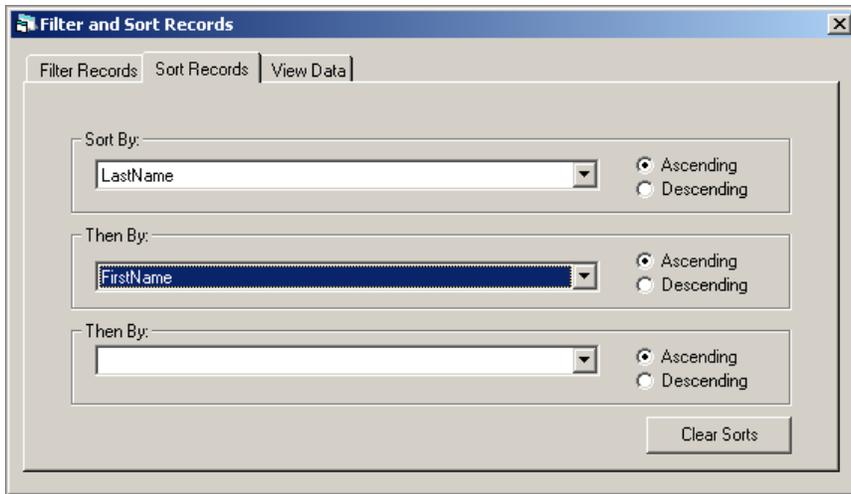5. Click on the Filter/Sort button.

6. If you want just the raw data (filtering and sorting to be done in your spreadsheet program), just click on the *Create Query* button.

In this case, we are filtering to get all records where the cumulative total is greater than $100 and they are in a zip code which begins with 32. When using the "is like" comparison, you can use the standard "wild card" characters.

7. If you want to sort the records in the file, click on the *Sort Records* tab. In this case, we are sorting by last name, then by first name.

8. When you are finished with sorting, click back on the *Filter Records* tab. Click on the Create Query button to create your query. If you know how to use SQL, you can modify the query and then click on the *Use modified SQL* button.

9. Click on the *OK/Continue* button.

10. Click on the *Export* button to create your export file. You will be prompted to select a location and file name.

11. For most programs, you will need to open the program (such as Excel) and *then* open the file you have exported.

NOTES

Some of the fields in the database file are calculated during the creation of Statutory Reports. If your export file will include cumulative amounts, you should create a Statutory Report BEFORE creating the export file.

Not all fields in the database file are used. Some exist only for compatibility between the different state versions.

Many of the fields in the database file that you might want to use are there mainly for internal program use, and the field names may not clearly describe the field. You should experiment with known data before creating your finished export file.

Tech Support does NOT include help with creating an export file for your specific needs. The best way to do this is by creating test files with known data until you get exactly what you are looking for.